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UNITED STATES CIVIL SERVICE COMMISSION
Office of the Executive Director
Interagency Advisory Group
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Minutes of the IAG Committee on
Personnel Management Evaluation

November 16, 1976

The meeting was chaired by John D. R. Cole, Chairman of the Personnel Management Evaluation Committee. He was accompanied by John J. Lafferty who Mr. Cole announced will be leaving BPME on December 7, 1976, to become the Regional Director of the Commission's New York Region. The agenda consisted of the following:

1. Update reports on:
 - The actions of the Joint Subcommittee on Position Classification and Position Management;
 - The Steering Committee workgroup on assessments of personnel management for evaluation planning purposes;
 - The Steering Committee workgroup on structured feedback between agencies and the CSC on joint evaluations;
 - PME training curriculum;
 - The project to review and improve the effectiveness of agency and CSC regulatory reviews.
2. Freedom of Information impact on agency internal evaluation reports.
3. Agency involvement on advance planning for the annual Planning Conference.

Update Reports

- Mr. Cole introduced Elsa A. Porter (CSC) who described the activities of the Joint Subcommittee on Position Classification and Position Management. Ms. Porter explained that workgroups had been formed on the following:

1. Definitions of Position Management
 2. Position Management Indicators
 3. Resources Needed for Position Management
 4. Standards of Adequacy for Position Management.
- Mr. Cole introduced Donald Murray (VA) who described his work with Doug Murphey (CSC) to develop a set of indicators for planning evaluations. Mr. Murray explained that in the past evaluation reports have been the primary source used to decide where evaluators go and what they focus on. The workgroup is looking at additional kinds of information which could be useful in planning future evaluation efforts.
 - Mr. Cole introduced John Campion (DOT) who described his work with Jim Murray (CSC) to develop a process for exchanging structured feedback between agencies and CSC as a result of participation in each other's evaluations. Mr. Campion explained that they had surveyed a number of other agencies and had found some problems and formed some conclusions. He briefly summarized the feedback problems as: (1) too informal, (2) no consistency in what is being fed back, (3) lack of timeliness, (4) no consistency in approach, and (5) too much negative and not enough positive feedback. Mr. Campion said that he hoped to get a draft of their proposals to the Committee members for comment in December.
 - Mr. Cole introduced John Raynor and Kathy O'Brien who have begun their duties in BPME to develop a training curriculum for PME's.
 - Mr. Cole summarized John Rathbone's (CSC) project to review and improve the effectiveness of agency and CSC reviews of legal and regulatory compliance. He explained that Mr. Rathbone had compiled an annotated inventory of these requirements and a plan for conducting a major special evaluation in this area. A number of agencies have expressed interest in the project and as a result an ad hoc group has been formed which is now reviewing Mr. Rathbone's work. The group will work together to develop the final evaluation plan and coordinate its execution. In addition to a major evaluation of legal and regulatory compliance, a goal of the project is to identify outmoded requirements and, as appropriate, try to have them revised or eliminated.

Freedom of Information Impact on Agency Evaluation Reports

Mr. Cole introduced Lew Fischer, the Commission's Information and Privacy Counsel, who summarized the CSC's experience with pertinent FOIA exemptions. Mr. Fischer explained the following exemptions:

1. FOIA Exemption 2 - "information related solely to the internal personnel rules and practices of an agency."
2. FOIA Exemption 5 - "inter-agency or intra-agency memorandum or letters which would not be available by law to a party, other than an agency, in litigation with the agency."
3. FOIA Exemption 6 - "personnel and medical files and similar files the disclosure of which would constitute a clearly unwarranted invasion of personal privacy."

After discussion between the agencies, Mr. Fischer, Mr. Cole, and Mr. Lafferty, Mr. Cole emphasized the following points to the Committee members.

- Agencies should consult with their own General Counsel regarding agency FOI policy as it relates to the format, content, distribution, etc., of internal PME reports to reach an internal PME report release/non-release policy.
- Agencies may want to consult with the Justice Department's Freedom of Information Committee, Mr. Robert Saloschin, regarding their decisions. Agencies are required to consult this Committee when they deny an appeal.
- The Commission's policy on release of Commission PME reports should not necessarily be interpreted as the guiding policy for agencies to follow.
- This IAG Committee may be the forum for agencies to use in developing a policy that crosses agency lines.
- Lew Fischer's comments should be understood as an explanation of the legal aspects of one agency's (the CSC) application of FOIA exemptions to one agency's documents (Commission PME reports). Parallel processes would need to be carried out by each agency.

Annual Planning Conference

Mr. Cole explained that for the February 1977 conference with 35 agencies with field installations (there may also be a conference for the smaller agencies at some other time), planning will be taken up with the Steering Committee in order to insure agency involvement with the planning of the conference. He anticipated that the conference will have a dual emphasis - that of updating and making midcourse corrections for FY 1978 and making any necessary major changes for FY 1979 in time for planning the FY'79 budget.

Before adjourning the meeting Mr. Cole told the members about a new installment of FPM Supplement (Internal) 273-73 re classification issues and a Justice Department handbook on Personnel Management Evaluation at the Installation Level. Copies of these two items were provided for the members as they left.